

Global Lithography Steppers Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Lithography Steppers market size is expected to reach \$ 20760 million by 2032, rising at a market growth of 10.3% CAGR during the forecast period (2026-2032).

Lithography Steppers are core equipment in semiconductor manufacturing, achieving high-precision pattern transfer through a 'step-and-repeat' technique. The core principle is to expose the integrated circuit pattern on the mask onto the surface of a coated wafer, field by field, using an optical projection system. After each exposure, the wafer stage moves to the next field, and this process is repeated until the entire wafer is covered. This technology can handle wafer warpage and thick resist processes, supporting advanced packaging needs such as flip-chip, fan-out WLP/PLP, and 2.5D/3D. Global stepper sales are expected to reach 500 units in 2024, with an average selling price of US\$20 million per unit. The industry's gross profit margin is approximately 40%.

Market drivers primarily include the following:

Fab expansion and process technology iteration

The global semiconductor industry's migration to advanced processes (such as 2nm and 3nm) has driven a surge in demand for high-end lithography equipment. There are already 32 12-inch fabs under construction in mainland China, representing a monthly production capacity exceeding 1.2 million wafers, directly driving annual lithography equipment procurement to over 350 units. At the same time, leading companies such as TSMC and Samsung are accelerating EUV equipment deployment to support 2nm mass production, further increasing market reliance on high-precision lithography equipment.

Geopolitics and supply chain restructuring

US technology controls on China (such as the inclusion of DUV immersion equipment in export licenses) have led to a fragmentation in the global supply chain. China has increased its support for localization through its 14th Five-Year Plan for the integrated circuit industry, increasing dedicated R&D funding for lithography equipment to 14.7 billion yuan in 2025. This will encourage local companies (such as Shanghai Microelectronics) to achieve mass production breakthroughs in 28nm DUV equipment. The localization rate is expected to increase from 19.3% in 2025 to 34.5% in 2030. Furthermore, the EU has extended the approval period for high-precision lithography machine components from China to 18 months, prompting Chinese and European companies to accelerate technological cooperation to circumvent trade barriers.

Expansion of Emerging Application Areas

Emerging technologies such as artificial intelligence and the Internet of Things are driving growing demand for compound semiconductors (such as silicon carbide and gallium nitride), with their procurement share increasing from 17% to 33%. Stepper lithography machines, adapted for specialized wavelengths (such as 365nm) and the manufacture of complex structure devices, have become key equipment in compound semiconductor production. Furthermore, the increasing adoption of advanced packaging technologies (such as fan-out WLP) requires lithography machines to support more complex pattern transfers, further expanding the market.

This report studies the global Lithography Steppers production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Lithography Steppers and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Lithography Steppers that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Lithography Steppers total production and demand, 2021-2032, (Units)

Global Lithography Steppers total production value, 2021-2032, (USD Million)

Global Lithography Steppers production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Lithography Steppers consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Lithography Steppers domestic production, consumption, key domestic manufacturers and share

Global Lithography Steppers production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Lithography Steppers production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Lithography Steppers production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Lithography Steppers market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include ASML, Nikon, Canon, Obducat, EV Group, SUSS MicroTec, SMEE, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Lithography Steppers market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (K USD/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Lithography Steppers Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Lithography Steppers Market, Segmentation by Type:

UV

DUV

EUV

Nanoimprint

Global Lithography Steppers Market, Segmentation by Application:

IDMs

OSAT

Companies Profiled:

ASML

Nikon

Canon

Obducat

EV Group

SUSS MicroTec

SMEE

Key Questions Answered:

1. How big is the global Lithography Steppers market?
2. What is the demand of the global Lithography Steppers market?
3. What is the year over year growth of the global Lithography Steppers market?
4. What is the production and production value of the global Lithography Steppers market?
5. Who are the key producers in the global Lithography Steppers market?
6. What are the growth factors driving the market demand?

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